

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:
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Post-Travel Filing Instructions: Complete this form within 30 days of returning travel. Submit all forms to the **Office of Public Records in 232 Hart Building.**

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☐ The original *Employee Pre-Travel Authorization* (Form RE-1), **AND**
- ☐ A copy of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): Partnership for a Secure America

Travel date(s): November 9 & 10, 2019

Name of accompanying family member (if any): _____

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING DID NOT INCREASE DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input checked="" type="checkbox"/> Good Faith Estimate	\$35	\$90	\$77	\$191 for Conference Services
<input type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate				
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): See attached itinerary

12/3/19 Patrick Warren Patrick Warren
 (Date) (Printed name of traveler) (Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

12/6/19 Rob Portman
 (Date) (Signature of Supervising Senator/Officer)

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will not be considered or approved. This form must be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Patrick Warren

Name of Traveler: _____

Senate Permanent Subcommittee on Investigations

Employing Office/Committee: _____

Partnership for a Secure America

Private Sponsor(s) (list all): _____

November 9-November 10

Travel date(s): _____

Note: If you plan to extend the trip for any reason you must notify the Committee.

Warrenton, VA

Destination(s): _____

Explain how this trip is specifically connected to the traveler's official or representational duties:

This trip is relevant to my official duties because the matters discussed at the conference will allow me to sharpen my understanding of the most significant U.S. national security issues. The trip will also help build relationships with staffers from across the aisle and help me to appreciate the compromise necessary to resolve these difficult questions.

N/A

Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

9/30/19

(Date)



(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

Sen. Rob Portman

Patrick Warren

I, Sen. Rob. Portman hereby authorize _____
 (Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

9/30/19

(Date)



(Signature of Supervising Senator/Officer)

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

1. Sponsor(s) of the trip (please list all sponsors): Partnership for a Secure America
2. Description of the trip: Congressional staff weekend of foreign policy and national security lectures.
3. Dates of travel: November, 9-10, 2019
4. Place of travel: Airlie Conference Center, Warrenton, VA
5. Name and title of Senate invitees: See attached list.
6. I *certify* that the trip fits one of the following categories:
 - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal and do not retain or employ registered lobbyists or agents of a foreign principal and no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
 - OR -
 - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).
7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
 - AND -
 - ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
8. I *certify* that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
 - AND -
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

- OR -

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

- OR -

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

Partnership for a Secure America (PSA) is solely responsible for planning and conducting this trip.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

PSA's mission is to promote bipartisanship in national security and foreign policy. This trip will bring together staff from both parties to build cross-party relationships and discuss diverse perspectives on pressing issues in the national security and foreign policy arena

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

This will be the 10th year of this such program and trip.

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15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

In addition to this congressional staff program, PSA releases high-level bipartisan policy statements on a range of foreign policy topics. These statements are generally available to the public.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$35 (Coach Bus)	\$90 (for one night)	\$77 (for two days)	\$191 conference services (for two days). This includes cost of breakout room, A/V equipment, and incidental snacks/ refreshments.

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This trip was organized specifically with regard to congressional staff participation

18. Reason for selecting the location of the event or trip

It is close to Washington DC, while also being able to get out of the area to encourage staff to step outside their daily routines.

19. Name and location of hotel or other lodging facility:

Airlie Conference Center, 6809 Airlie Road, Warrenton, VA 20187

20. Reason(s) for selecting hotel or other lodging facility:

It provides all necessary accommodations in one location that is close to Washington DC for a one night trip. The lodging and conference location is all the same.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Meals and lodging are below the per diem rate.

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

Participants will be transported round trip by coach bus.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

None

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: John C. Sullivan

Name and Title: John Sullivan, Congressional Relations Associate

Name of Organization: Partnership for a Secure America

Address: 1129 20th St. NW, Suite 500, Washington DC 20036

Telephone Number: 202-293-8580

Fax Number: NA

E-mail Address: sullivan@psaonline.org

UNCLASSIFIED



Itinerary:

1:30 pm	Depart from Union Station, Washington, DC
3:00 – 4:00 pm	Arrive at Airlie Conference Center & Check-in
4:00 – 5:30 pm	Material Review and Preparation
5:30 – 6:00 pm	Opening Remarks and Review of Agenda: Andy Semmel, Chairman of the Board of Directors, Partnership for a Secure America Andy Semmel will outline retreat agenda, provide logistical information for the weekend (i.e. location of restrooms, where to store luggage, etc.), and all attendees will introduce themselves.
6:00 – 6:30 pm	Airlie House – Meadow Room Guest Speakers: Graeme Bannerman, Board of Directors – Partnership for a Secure America; & Andy Semmel, Chairman of the Board of Directors, Partnership for a Secure America Topic: Bipartisan Panel: Principles and Processes for Cooperation (<i>Confirmed</i>) Discussion will cover the specifics of how a bipartisan group of Congressional staff are able to negotiate, cooperate, and achieve success in pursuit of legislative duties. Participants will engage one another in a partnership exercise.

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Federal Room

Informal conversations with guest speakers

7:00 – 9:00 pm

Federal Room

Guest Speaker: Hon. Brad Carson, Professor of Public Policy, Frank Batten School of Leadership and Public Policy, University of Virginia

Topic: Perspectives of a Former Congressman on matters concerning national security with a focus on U.S.-China relations.

Mr. Carson will offer perspectives on his time serving as an intelligence officer, as an Acting-Under Secretary, and as a Member of Congress. Mr. Carson will discuss issues relevant to U.S.-China relations.

9:00 – 10:00 pm

Federal Room

After-Dinner Reception

Informal conversations with guest speakers

Attendees will have an opportunity to informally engage their colleagues, PSA staff, and speakers.

Between 8:00 – 9:00 am

Airlie House – Dining Room Breakfast

9:00 – 12:00 pm

Group A

Airlie House – Meadow Room

National Security Council Simulation

National Security Advisor: Mr. Robert Sheldon,
Head of Technology Strategy for Public Sector at
CrowdStrike

(Confirmed)

Participants will engage in a simulation where they are asked to negotiate a solution to a hypothetical foreign policy crisis.

9:00 – 10:30 am

Group B

Airlie House – Jefferson Room

Guest Speaker: Ms. Tamanna Salikuddin,
United States Institute of Peace

Topic: Fostering Peace Processes

(Confirmed)

Ms. Salikuddin will draw on her experience as the Senior Expert for Inclusive Peace Processes at the United States Institute of Peace with a regional focus of South Asia

10:30 – 12:00 pm

Group B

Airlie House – Jefferson Room

Guest Speaker: Mr. Robert Cardillo,
Distinguished Fellow, Center for Emerging
Technology and Security, Georgetown University

Topic: How Geospatial Intelligence Supports

National Security, and Perspectives on Integration in the Intelligence Community

(Confirmed)

Mr. Cardillo will draw on his experiences working in the National Geospatial-Intelligence Agency and the Office of the Director of National Intelligence.

12:00 – 1:00 pm

Airlie House – Dining Room
Lunch

1:00 – 2:00 pm

Informal conversations with guest speakers

2:00 – 5:00 pm

Group B
Airlie House – Meadow Room
National Security Council Simulation

National Security Advisor: Mr. Robert Sheldon,
Head of Technology Strategy for Public Sector at
CrowdStrike
(Confirmed)

Participants will engage in a simulation where they are asked to negotiate a solution to a hypothetical foreign policy crisis.

2:00 – 3:30 pm

Group A
Airlie House – Jefferson Room
Guest Speaker: Ms. Tamanna Salikuddin,
United States Institute of Peace
Topic: Fostering Peace Processes
(Confirmed)

Ms. Salikuddin will draw on her experience as the Senior Expert for Inclusive Peace Processes at the United States Institute of Peace with a regional focus of South Asia

Group A

Guest Speaker: Mr. Robert Cardillo,
Distinguished Fellow, Center for Emerging
Technology and Security, Georgetown University
Topic: How Geospatial Intelligence Supports
National Security, and Perspectives on
Integration in the Intelligence Community
(Confirmed)

5:00 – 5:30 pm

Airlie House – Meadow Room

Wrap-up and Departure from Airlie



Fall 2019 Senate Participant List:

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